CiviCRM Summary Fields in Action

Enhanced Donor, Member, and Event Data

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helping others help others

Summary Fields

https://civicrm.org/extensions/summary-fields

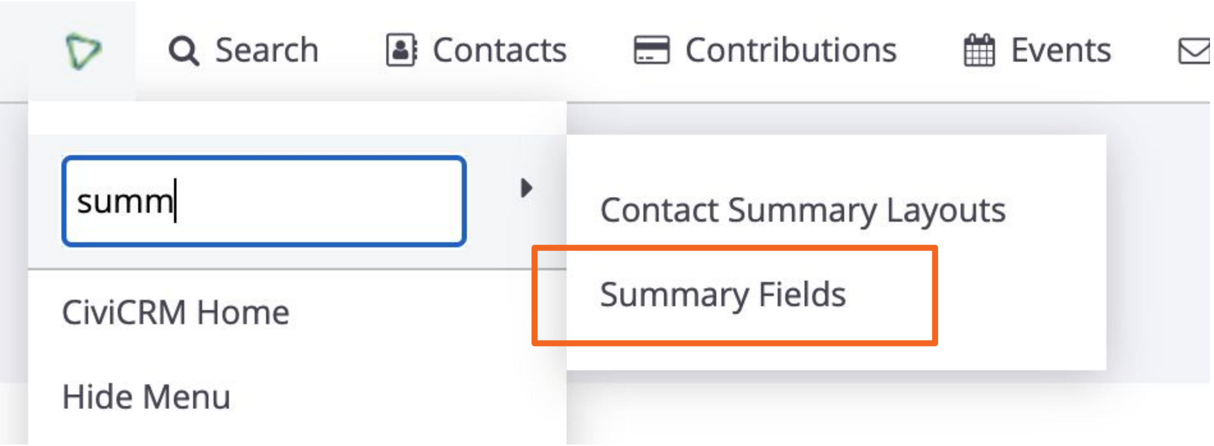
https://github.com/progressivetech/net.ourpowerbase.sumfields

Developed by Jamie McClelland from Progressive Technology Project

Active Installs: 1,807

Get Started

- Install Summary Fields
- Configure it:
  - Admin > Customize Data and Screens > Summary Fields
  - From a Contact Record
  - Or....



Settings

- Components: Fundraising, Membership, Event
  - *Remember Word Replacement!*
- "Show Simplified Fields"
  - Help text: By default, contribution fields are calculated using the line items table, which provides the most accurate accounting if you use price sets with different financial types. Simplified contribution fields are calculated using the contribution table, which is more efficient and will work better on large installations and won't accurately count a single contribution split between two line items (e.g. an event registration and donation).

Performance Settings

PERFORMANCE SETTINGS

How often should summary data be updated?

○ Instantly ● When ever the cron job is run (increases performance on large installation)

If 'Instantly' is selected, data will be more accurate but you might face some performance issues on large installations.
If 'Whenever the cron job is run' is selected, Summary Fields will rely on each CiviCRM Cron job to process all calculations needed for all contacts.

Exclude Summary Fields from logging?

● Yes ○ No

When advanced logging is turned on, you can exclude Summary Fields from being logged to increase performance and reduce clutter.

When should these changes be applied?

● On the next scheduled job (cron) ○ When I submit this form

Applying these settings via this form may cause your web server to time out. Applying changes on next scheduled job is recommended.

- Select Financial Types to include when calculating contribution related summary fields

Fundraising

Fiscal Year can be set at Administer > Localization > Date Formats

Contribution Fields

- [ ] Total Lifetime Contributions
- [ ] Total Contributions this Fiscal Year
- [ ] Total Contributions in the Last 12 Months
- [ ] Total Deductible Contributions this Fiscal Year
- [ ] Total Contributions last Fiscal Year
- [ ] Total Deductible Contributions last Fiscal Year
- [ ] Total Contributions Fiscal Year Before Last
- [ ] Total Deductible Contributions Fiscal Year Before Last
- [ ] Count of Contributions this Fiscal Year
- [ ] Count of Contributions last Fiscal Year
- [ ] Count of Contributions Fiscal Year Before Last
- [ ] Amount of last contribution
- [ ] Date of Last Contribution
- [ ] Amount of first contribution
- [ ] Date of First Contribution
- [ ] Date of Largest Contribution
- [ ] Largest Contribution
- [ ] Count of Contributions
- [ ] Average Annual (Calendar Year) Contribution

Soft Credit Fields

- [ ] Total Lifetime Soft Credits
- [ ] Total Soft Credits this Fiscal Year
- [ ] Total Soft Credits in the Last 12 Months

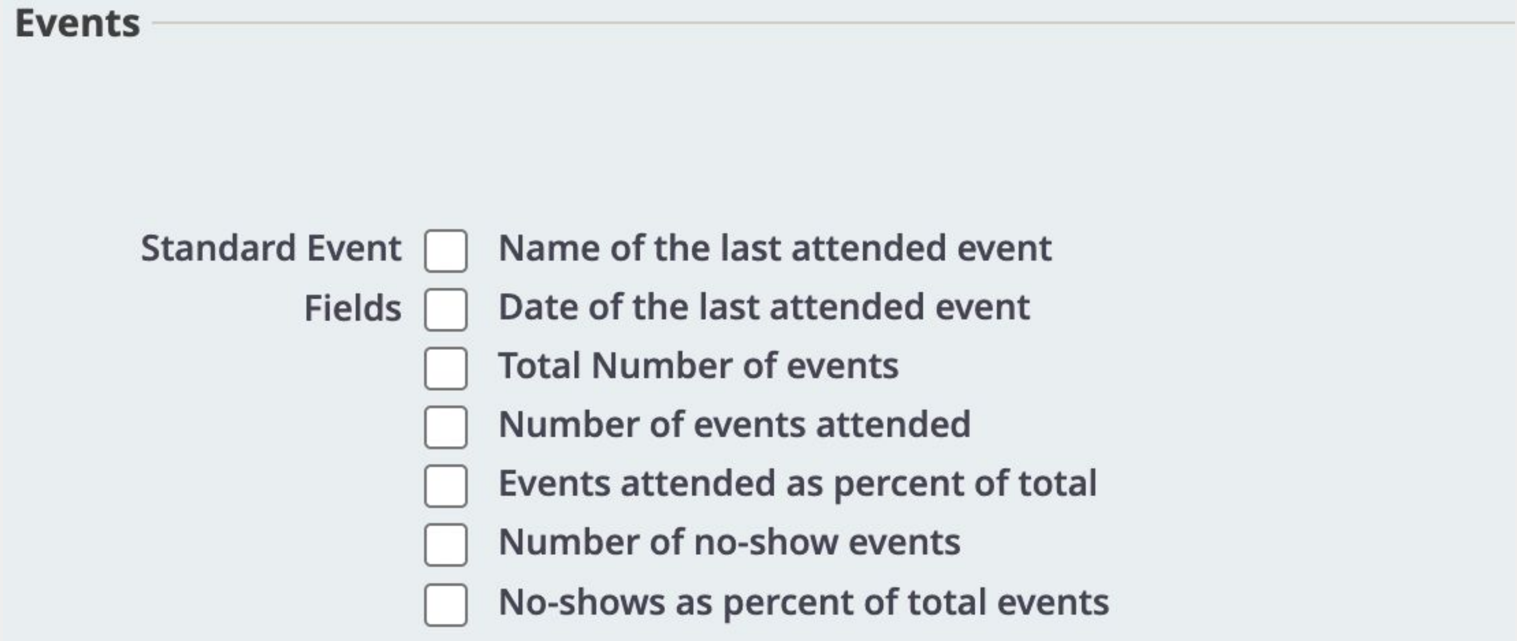
- Select Financial Types to include when calculating membership related summary fields

Membership

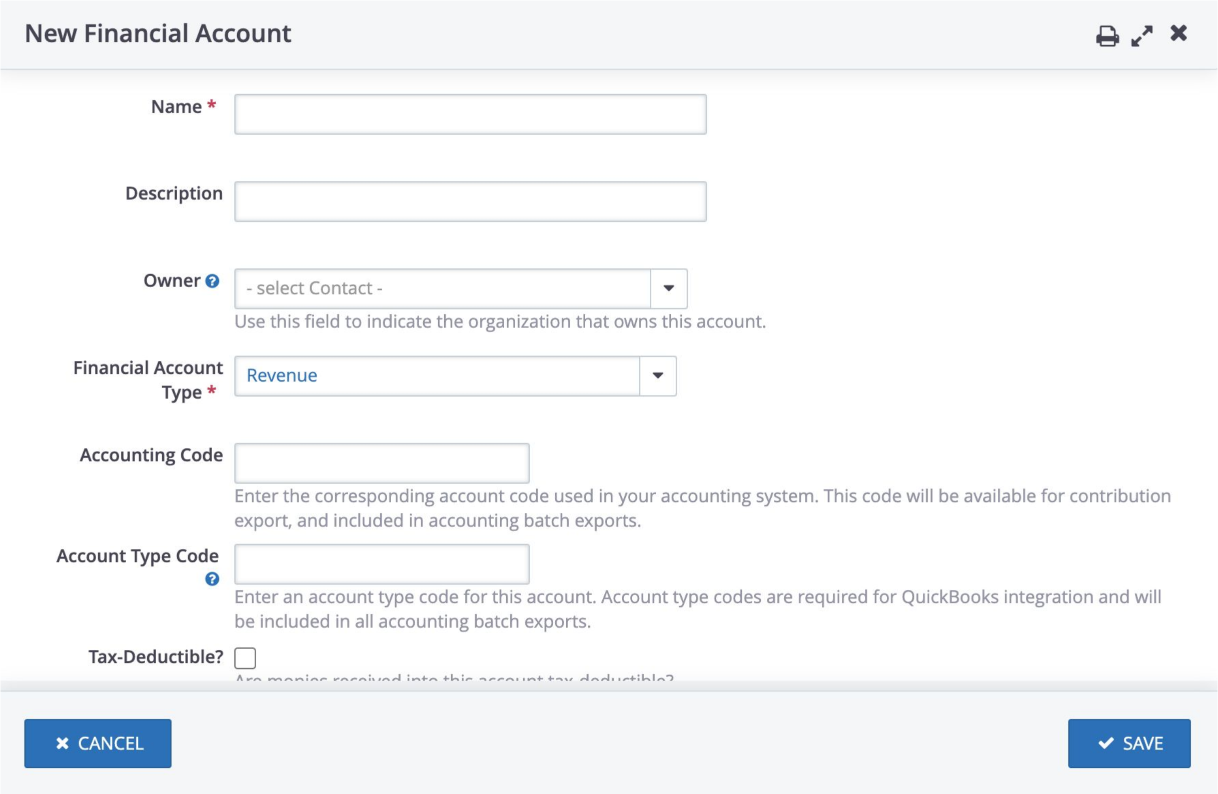
Membership Fields

- [ ] Date of Last Membership Payment
- [ ] Date of Last Membership Payment (simplified)
- [ ] Amount of Last Membership Payment
- [ ] Amount of Last Membership Payment (simplified)
- [ ] First membership join date
- [ ] Latest membership end date

- Select “Event Types” to include when calculating participant summary fields
- Select “Participant Status” for denoting “Attended” vs “Did Not Attend”



Financial Accounts



Financial Accounts correspond to those in your accounting system

Financial Types

Name	Description	Financial Accounts	Deductible?	Reserved?	Enabled?	
Campaign Contribution		Campaign Contribution,Accounts Receivable,Banking Fees,Premiums	No	No	Yes	Accounts Edit

New Financial Type

Name *

Description

Tax-Deductible? ☐
Are contributions of this type tax-deductible?

Reserved? ☐

Enabled ☑

Financial Types are used to categorize contributions for reporting and accounting. Each relate to a number of Financial Accounts.

Advanced Search

Key Actions:

- Add Activity
- Add relationships
- Bulk Update
- Group / Smart Group
- Email
- Export
- Print/merge document

Summary Fields

Total Lifetime Contributions From		To	
Total Contributions this Fiscal Year From		To	
Total Contributions last Fiscal Year From		To	
Total Contributions Fiscal Year Before Last From		To	
Amount of last contribution From		To	
Date of Last Contribution	- any -		
Date of First Contribution	- any -		
Largest Contribution From		To	
Count of Contributions From		To	
Average Annual (Calendar Year) Contribution From		To	

Reports - Columns & Filters

Key Actions:

- Dashlets
- Quick Access
- Reserved
- Email Delivery
- Export

Summary Fields

Total Lifetime Contributions	Is less than or equal to	
Total Contributions this Fiscal Year	Is less than or equal to	
Total Contributions last Fiscal Year	Is less than or equal to	
Total Contributions Fiscal Year Before Last	Is less than or equal to	
Amount of last contribution	Is less than or equal to	
Date of Last Contribution	- any -	
Date of First Contribution	- any -	
Largest Contribution	Is less than or equal to	
Count of Contributions	Is less than or equal to	
Average Annual (Calendar Year) Contribution	Is less than or equal to	

Nonprofit Use Case:

Fields used:

- Total Lifetime Contributions
- Amount of Last Contribution
- Largest Contribution
- Count of contributions
- Total for indicated year

"The development team utilizes the summary fields in reports for both our major donor and prospective major donor groups. For major donors, those values help inform correspondence between the development team and the donor.

*We used the **amount of last contribution** and **largest contribution** to help inform the development team when building out the Major Donor EOY campaign. For the prospective group, the **largest contribution** and **total lifetime** really helped us segment and identify qualified leads who we are currently corresponding with in hopes of moving them to our major donor group."*

Let’s Chat

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